NSLP
SCHOOL MEALS INITIATIVE (SMI) REVIEW GUIDANCE
TECHNICAL ASSISTANCE REVIEW

NOTE: *Only areas related to SMI are included in this guidance* (all other areas of review can be found in the NSLP CRE Administrative Review Guidance)

(1) AREA TO BE REVIEWED	(2) AGENCY HAVE THESE DOCUMENTS AVAILABLE	(3) AGENCY (√) CHECKLIST	(4) ADDITIONAL INFORMATION
SITE SELECTION One site for <u>each type</u> of meal planning used by the district will be selected.	Copy of current site list as submitted to Nutrition Services Division (NSD) at renewal indicating menu planning method by site. If CRE is conducted at the same time, SMI site(s) will be selected as one of the CRE site(s).		Site selection criteria includes: • Food Service Director request • Satellite or production kitchens • Sites that have - new staff; complex serving lines; multiple menu choices; grade mix; made healthy meal changes; different cycle menus; not been previously reviewed.
FOOD BASED MENU PLANNING APPROACHES: **ENHANCED** (formerly FBMP) **TRADITIONAL** (formerly 94/95) **SHAPE REVISED MEAL PATTERN (SRMP)** Menus and information will be needed for both breakfast and lunch	1. MENUS for the Review Period listing components/portion size for each grade group. 2. STANDARDIZED RECIPES (for each site) for items that contain more than one ingredient. INCLUDE: a) Name of recipe b) Yield (include serving size and number of servings) c) All ingredients - the form (fresh, frozen, light syrup. Etc.) d) Correct measures, weights e) Preparation instructions f) Contribution to the meal pattern 3. PROCESSED FOODS: a) Manufacturer's specifications or Child Nutrition Label (CN label). b) Nutrition information label documenting nutrient levels for Calories, Protein, Vitamins A and C, Iron, Calcium, % of Calories from Fat and Saturated Fat.		All food based menu planning approaches: • Documents listed in column (2) will be needed to complete a week of menu analysis. • The state will complete a nutritional analysis and give assistance to improve the quality of the meals. • Documents may be requested ahead of the review date, so nutrient analysis may be conducted prior to the review. • Standardized Recipe form is Attachment A • Vendor Product List is Attachment B • The reviewer will select the month and week of review. If conducted during a CRE review the review month may be different for the SMI review. NOTE: Districts are encouraged to complete the nutritional analysis of recipes and menus.

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FOOD BASED MENU PLANNING APPROACHES (continued)	4. MENU PRODUCTION and/or TRANSPORT RECORDS for all sites. INCLUDE: a) Number of meals panned and number served, by grade group b) All planned menu items used to meet the required meal pattern, condiments, and non-creditable desserts c) Serving size by grade group for each food item d) Total amount of food prepared for the number of by grade group e) Actual number of students and adults served f) A la carte and adult meals planned and served g) Leftover usage records, substitution lists and dates		
	5. Copy of nutrient analysis if one has been conducted by the district (not required for district to do an analysis)		Document which USDA approved software was used.
NUTRIENT STANDARD MENU PLANNING OPTIONS: **NSMP** **SHAPE NUTRIENT STANDARD MENU PLANNING (SNSMP)**	1. MENUS for the Review Period listing type of menu item/portion size for each grade group.		The Reviewer will select the month and week of review. If conducted during a CRE review the review month may or may not be the same for the SMI review.
	2. STANDARDIZED RECIPES (for each site) for items that contain more than one ingredient. INCLUDE: a) Name of recipe b) Yield (include serving size and number of servings) c) Documentation of type of menu item i.e. entrée or side dish d) All ingredients and type (fresh, frozen, light syrup. Etc.) e) Correct measures, weights and/or pack size. f) Preparation instructions g) Nutrient analysis of all recipes		• Provide documentation of the type and most current version of USDA approved nutrient analysis software being used. • Sample standardized recipe form is Attachment A.

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NUTRIENT STANDARD MENU PLANNING APROACHES (**c**ontinued)
 	
Menus and information will be needed for both breakfast and lunch
	3. PROCESSED FOODS:
	   a) Reference by manufacturer, product name, and code number from the locked USDA Database
	   b) Nutrition information label documenting nutrient levels for Calories, Protein, Vitamin A and C, Iron, Calcium, % of Calories from Fat and Saturated Fat.
			• Sample vendor product list is Attachment A
			
			• Insure that all planned menu items are served in the portions which correspond to the ones analyzed (the same product/recipe analyzed is the one served at reviewed sites).

	4. MENU PRODUCTION and/or TRANSPORT RECORDS for all sites. INCLUDE:
	   a) Number of meals panned and number served, by grade group.
	   b) All planned menu items used to meet the daily and weekly requirements, including condiments.
	   c) Serving size by grade group for each food item.
	   d) Total amount of food prepared for the number of students by grade group.
	   e) Actual number of students and adults served.
	   f) A la carte and adult meals planned and served.
	   g) Leftover usage records, substitution lists and dates.
			• Records must include type and quantity of food used, number persons served, and portion size for the month of review.
			
			• Any substitutions of menu items must follow the "two week window"" and be clearly documented.

	5. AVERAGE WEEKLY NUTRITIONAL ANALYSIS AND DAILY ANALYSIS for each day meals are served by grade or age group including information for meeting all required nutrition standards, i.e., calories, protein, vitamins A and C, iron, calcium, total fat, and saturated fat.		• Cholesterol, fiber, and sodium levels are also important to evaluate. • Nutritional analyses for each week must be available for review. They may be stored as computer files or as paper printouts
	6. PRINTOUT OF AGE/GRADE STANDARDS used including any custom standards.		

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ASSISTED NUTRIENT STANDARD MENU PLANNING (ANSMP)	1. Initial cycle menu and backup documents submitted to NSD.		Refer to Management Bulletin 96-111 If the consultant has some of the documentation in another location, the reviewer may be willing to look at it there.
	2. Approval letter of the initial cycle menu by the NSD.		
	3. Name, address, contract, and qualifications of the consultant.		
	4. All the items required for NSMP must be available for review at the school/agency (see prior page).		
ON-SITE VISIT (All menu planning approaches)	1. Menu for the day with portion size per age/grade group.		Reviewers will be asking for these items from the site staff. They also make observations of meal preparation and serving.
	2. Menu production records/nutrient analysis for the day.		
	3. Standardized recipes and processed product information for items served those day.		
NUTRITION EDUCATION (All menu planning approaches)	1. Samples of any nutrition education to promote healthy lifestyles for children, school staff or parents. 2. Training for food services staff on SMI or related topics. 3. Team Nutrition activities or materials. 4. SHAPE California activities or materials. 5. Garden Project activities or materials. 6. Displays of the Food Guide Pyramid and the Dietary Guidelines. 7. Menu slicks with nutrition education/physical exercise promotions. 8. Outreach including school boards, community, farmer, and parent organizations.		This could also include Nutrition integrated into curriculum, nutrition disclosure on menus or in newsletters, and local nutrition policy.

REFERENCES

1. Healthy School Meals Training Manual,
2. Summary of Final Rule – Menu Planning Approaches Management Bulletin 00-113
3. Code of Federal Regulations (7 CFR) Part 210.10 and 220.8 Menu Planning Approaches
4. Management Bulletins:
   - 96-111 Assisted Nutrient Standard Menu Planning
   - 96-113 Nutritional Analysis of USDA Quantity Recipes
   - 97-107 Grain/Bread Requirements
5. SMI Questions and Answers
6. USDA Currently Approved software
7. School Nutrition Programs Administrative Manual